

## Assistant to the Head of Wealth Management

Handelsbanken Wealth & Asset Management is a wholly-owned subsidiary of the Handelsbanken Group and is responsible for all wealth and investment management activities of the Group in the UK. Founded in Sweden, Handelsbanken is one of the world's strongest banks and offers local relationship banking, advice and investment management to personal and corporate customers through its fast-growing network across the UK. For over 30 years we have been relied on by our customers, including business leaders and sophisticated financial professionals, to advise them and to manage their wealth. We focus on one objective – customer satisfaction – since a satisfied customer will be happy to both return and to recommend us.

This is an opportunity to join a successful and fast-growing national organisation with the added benefit of being part of a significant multinational group.

Handelsbanken Group are deeply committed to embedding good equality and diversity practice into all of our activities so that Handelsbanken Wealth & Asset Management is an inclusive, welcoming and inspiring place to work, regardless of age, disability, pregnancy and/or parental status, ethnicity, religion, sex, gender reassignment or sexual orientation.

Handelsbanken is offering a Hybrid Working Model. Our approach to hybrid working at Handelsbanken is that we spend the greater proportion of our working time at our workplace. Our remaining time may be worked from home. This approach allows us to embrace the many benefits of hybrid working whilst sustaining and developing our unique culture.

We encourage and welcome applications from across the global community and all appointments are made solely on merit.

### Remuneration

Competitive + Benefits

### Our Role

We are recruiting for an Assistant to the Head of Wealth Management and are looking for someone with excellent organisational and business management skills as well as an interest in Wealth Management. This role will be based in our London office.

### Main Responsibilities

- Assistant to the Head of Handelsbanken Wealth Management
- Diary management and coordination for Head of Wealth Management, including setting reminders for deadlines to ensure optimum efficiency.
- Inbox management and coordination for Head of Wealth Management.
- Make arrangements for meetings and travel for Head of Wealth Management, including booking accommodation where necessary.
- Provide business management support for the Handelsbanken Wealth Management Leadership team, overseeing all relevant activities effectively.
- Liaise with business departments (such as HR, Compliance, Finance) to ensure members of Handelsbanken Wealth Management and the Head of Wealth Management fulfil all required obligations in a timely manner.
- Act as secretary to all internal Wealth Management meetings and committee meetings, to include but not limited to diary management, minute taking, agenda setting, and the coordination of materials.
- Prepare and collate data for the monthly Management Business Report ready for submission.
- Prepare other such reports like the Quarterly Board Report and ExCo, ensuring deadlines are met for submission.

- Maintain oversight of the business procedures, Distribution Strategy, Terms of Reference for DC, ensuring they are reviewed regularly and updated as necessary.
- Establish and maintain strong working relationships across the company and the Bank.
- Minute taking for Distribution Committee and Leadership Team Meetings.

#### **Additional Tasks:**

- Support the Head of Wealth Planning and the team with ad-hoc tasks, including carrying out provider Due Diligence and liaising with Business Support Governance upon completion.
- Liaise with the Communications team for any uploads or changes to be made on the adviser section of the Intranet.
- Ad-hoc coordination duties, for 3 regional teams and Leadership Team members.
- Support existing client meetings and new client acquisition activities by advising Handelsbanken Wealth Management on Wealth Management team availability, arranging ad-hoc travel and responding to requests for information.
- Organise regional and national team meetings as well as training events and business development conferences.
- Assist CDs and ACDs with regional Wealth Champion events at Kingsway office.
- Co-ordinating and booking induction meetings for new members of the Wealth team.
- Note taking for the Cross Business Working Group.
- Ad-hoc departmental tasks, including assisting finance with Wealth requirements for external audit when needed.
- Cover where necessary for the CEO's EA when they are on annual leave.
- Co-ordination and event management for departmental events, including Christmas events.

## Person Specification

#### **Experience:**

- Previous personal assistant experience within a financial services environment is essential.

#### **Core Values:**

- Is business-oriented and focuses on the customer.
- Takes a long-term approach.
- Has the courage to make decisions.
- Is innovative and proactive.
- Takes responsibility for their own development.
- Has high ethical and moral standards.
- Likes good administrative order.
- Collaborates with others to achieve joint goals.
- Contributes to the development of operations and colleagues.

## Contact

Please send your CV and covering letter to [careers.hwam@handelsbanken.co.uk](mailto:careers.hwam@handelsbanken.co.uk)